



**CITY OF LODI
COUNCIL COMMUNICATION**

AGENDA TITLE: Approve Lodi Tourism Business Improvement District (LTBID) 2013 Annual Report, Adopt Resolution of Intention to Levy Annual Assessment, and Set a Public Hearing for November 21, 2012 to Consider the Proposed Assessment

MEETING DATE: November 7, 2012

PREPARED BY: Deputy City Manager

RECOMMENDED ACTION: Approve Lodi Tourism Business Improvement District (LTBID) 2013 Annual Report, adopt Resolution of Intention to Levy Annual Assessment, and set a public hearing for November 21, 2012 to consider the proposed assessment.

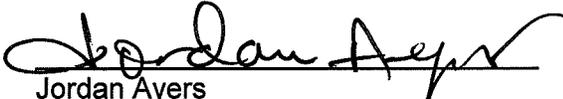
BACKGROUND INFORMATION: Pursuant to Lodi Municipal Code Chapter 12.07 and Streets and Highways Code Section 35600 et seq., the LTBID membership board is required to present an Annual Report (Exhibit A) for the City Council's review and approval. This must be done prior to the public hearing and adoption of a resolution confirming the 2013 Annual Report and levy of assessment. The City collects an administrative fee of 5 percent from the LTBID assessment. Representatives of the LTBID will be in attendance to make a presentation. The levy of the annual assessment will be discussed at a public hearing on November 21, 2012.

The City provides additional funding to Visit Lodi! under a Memorandum of Understanding (MOU) approved by the City Council on August 19, 2009. The MOU provides additional funding at a rate of 19 percent of the Transient Occupancy Tax (TOT) collections. The MOU covers the period of July 1, 2009 through June 30, 2014 and includes a provision for an annual report.

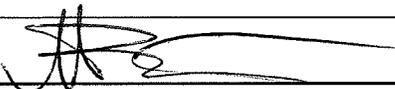
Nancy Beckman, President and CEO of Visit Lodi!, will present the Annual Report to the Council.

FISCAL IMPACT: Funding for Visit Lodi! generates additional funding for local merchants and the City as tourism dollars are spent locally.

FUNDING: \$88,300 is included in the FY 2012/13 City budget.


Jordan Ayers
Deputy City Manager

Attachment

APPROVED: 
Konradt Bartlam, City Manager



October 24, 2012

Randi Johl
City of Lodi
221 W. Pine St.
Lodi, CA 95240

Dear Ms. Johl,

Enclosed please find the 2013 Annual Report for the Lodi Tourism Business Improvement District (LTBID) which was established October 6, 2004 by City Ordinance 1753 and was amended 11/19/2008 by Resolution No. 2008-229.

Enclosed you will find a 2013 work plan, budget and method of assessment as required by the California Streets and Highways Code #33650. Please note there are no suggested changes to the District at this time.

I plan to make a presentation to the Council at the November 7, 2012 City Council meeting. Please feel free to call me with any questions you may have.

Sincerely,

A handwritten signature in cursive script that reads "Nancy Beckman". A horizontal line extends to the right from the end of the signature.

Nancy Beckman
President and CEO

2013 Lodi Tourism Business Improvement District Annual 3

Assessment Funding Purpose: To administer marketing programs to promote the City of Lodi as a tourism destination and to fund projects, programs, and activities that benefit hotels within the Business Improvement District boundaries

Method of Assessment: The LT BID includes all hotels/lodging facilities within the City of Lodi as well as two properties currently located at the intersection of Kettleman Ln. and 1-5. Each lodging facility within the district shall be assessed 3% of the gross room rental revenue. Rentals (stays) lasting over 30 days are not subject to the assessment. The assessment is levied annually and collected quarterly.

2013 Work Plan (See Attached)

For the purpose of the Annual Report presentation, we have broken our 2013 Work Plan into 5 project areas:

- Marketing/Promotional Activities
- Customer Service & Hospitality
- Events
- Communications
- Committees

2013 Budget

Income - BID	\$312,000.00
Income-City of Lodi	\$102,464.00
Income - Tourism Lunch	\$8,500.00
Income-postage donations	\$30.00
Income -Ares booking engine	\$60.00
Income-website advertising	\$1,750.00

Total Income **\$424,804.00**

Advertising	\$65,000.00
Automobile Expense	\$3,717.00
Bank Service Charges	\$525.00
Contingencies/Unexpected Opportunities	\$7,568.00
Dues & Subscriptions	\$3,470.00
Education/Conferences	\$1,175.00
Equipment Lease	\$3,801.00
Event Expenses - Tourism Lunch	\$7,998.00
Gifts	\$200.00
Hospitality/Meetings: Planning Retreat	\$2,000.00
Hospitality/Meetings: Other	\$2,618.00
<u>Insurance</u>	
Directors & Officers	\$1,216.00
Health	\$4,200.00

Liability	\$700.00
Work Comp	\$1,500.00
<u>Office Expenses</u>	
Maintenance	\$6,390.00
Supplies	\$1,965.00
<u>Personnel</u>	
Salaries	\$157,000.00
Benefits	\$10,522.00
Postage & Delivery	\$2,863.00
Printing & Reproduction	\$5,225.00
<u>Professional Fees</u>	
Accounting	\$3,585.00
Administration-City of Lodi	\$15,600.00
Promotion	\$44,720.00
Rent	\$34,800.00
<u>Repairs</u>	
Computer Repairs	\$1,000.00
<u>Tax & License</u>	
Payroll	\$14,561.00
Property	\$0.00
Licenses	\$25.00
Technology	\$4,695.00
Telephone	\$2,520.00
Trade Shows	\$5,650.00
<u>Travel & Entertainment</u>	
Meals	\$875.00
Travel	\$2,720.00
Utilities - Gas & Electric	\$4,400.00
Total Expense	\$424,804.00
Net Profit (Loss)	\$0.00

Visit Lodi!
Conference & Visitors Bureau
2013 Work Plan

Marketing/Promotional Activities

Leisure Market

Targeted Advertising: Ads will be placed in designated target markets including the greater Sacramento, greater Bay Area and Northern California region to promote Lodi. Ads will be both hard copy and digital in nature and will include a response measure for tracking purposes wherever possible.

Trade Shows: Visit Lodi! will have a booth at the 2013 Bay Area Travel Show and will partner with the Central Valley Tourism Association to promote and represent Lodi at the Long Beach Travel and Adventure Show. Staff will actively promote and recruit partners to participate as vendors where possible as a way to have a greater presence at the shows while increasing visibility and promotional opportunity for Lodi. All leads will be tracked and a database of contacts will be maintained for future marketing opportunities.

LodiView: Visit Lodi! will continue to offer LodiView as a monthly e-publication highlighting Lodi events and activities of interest to the tourist. LodiView distribution is currently at over 4,000 subscribers.

Quarterly e-postcards: In 2013 Visit Lodi! will produce quarterly e-postcards that will be mailed to our marketing database. Each postcard will feature a call to action and will give recipients the ability to click through to the Visit Lodi! website for special offers and other Lodi visitor information.

Social Media: Staff will utilize social media (Facebook & Twitter) a minimum of twice a week to promote Lodi events and businesses. Staff proposes to utilize contests and give-a-ways as a way to increase followers. In addition, staff will produce quarterly Lodi You Tube videos.

Group Market

Tradeshows: Visit Lodi! will attend three sales shows created for the group market: The California Society of Association Executives (Cal SAE), the Sacramento/Sierra Nevada Chapter of Meeting Professionals International (MPI) Conference and Trade Show, and Society of Government Meeting Planners (SGMP). All sales leads will be followed up on and added to our database for future marketing opportunities.

Visit Lodi! will partner with the Central Valley Tourism Association to promote and represent Lodi at POWWOW and the International Tour Management Institute.

Fam Tours: Visit Lodi! Group Sales Manager will host quarterly Fam Tours for meeting planners and group decision makers as a tool to showcase Lodi as a group meeting destination.

Direct Mail Campaign: Quarterly fliers/brochures will be sent to group sales decision makers to reinforce the vision of Lodi as a go-to destination for meetings/conferences/events. Quarterly mailers will keep Lodi top-of-mind for meeting planners, association leaders and social/fraternal groups.

Local Host Program: In 2013, the Group Sales Manager will reach out to locals with quarterly email blasts and direct calls to promote the Host-at-Home Program. When appropriate, the Host-at-Home Award will be given out at the Annual Tourism Luncheon as a way to generate group sales leads by 1.) reminding citizens and local leaders as to the benefits of bringing their groups to Lodi, and 2.) recognizing individuals who participate in the program by referring groups to Visit Lodi! sales staff.

Sales Calls: An average of two days a month sales staff will make face-to-face sales appointments to group decision makers out of the area in an effort to sell them on bringing their group events and meetings to Lodi. Additionally, sales staff will utilize cold calls to meeting planners and association leaders as a way to maintain visibility and continually educate potential clients to the value of Lodi as a meeting destination.

Wine & Dine: Visit Lodi! will hold two out of the area Wine & Dine social events for group decision makers as an alternative to the FAM Tour. These events will provide an opportunity for Visit Lodi! staff to promote Lodi to hard-to-reach decision makers.

Meeting Professionals Organizations: The Group Sales Manager will maintain memberships in MPI, SGMP and CalSAE and regularly attend meetings and events of these organizations. This gives Visit Lodi! an opportunity to help build business relationships with group decision makers.

Sponsorships and Incentives: Visit Lodi! will utilize sponsorships and incentives at tradeshow and industry events (when appropriate and as funding allows) as a method by which to introduce the group market to Lodi as a destination. Sponsorships may be used as an incentive to facilitate bringing a group event to Lodi. Examples are sponsoring a wine reception at a meeting planner's conference or offering a cash incentive to bring a group to Lodi.

t **Service/Hospitality**

Visitor Information Packets: Visitor information will be distributed on request via email or through access on our website.

Website: The goal of the Visit Lodi! website is twofold: 1.) To educate and create awareness of Lodi as a visitor destination and to 2.) Provide the highest degree of customer service by ensuring that visitor information is complete, up-to-date and easily accessible. In 2013 Visit Lodi! will redesign their website as well as produce a mobile site to reflect the marketing direction suggested by the 2012 Lodi Brand Print program.

Visitor Publications: Visit Lodi! will develop and maintain a number of publications geared to increase availability of visitor information.

- **Lodi Visitor Guide:** An updated Lodi Visitor Guide will be presented for distribution in the Summer of 2013. The book which is designed to showcase Lodi to potential visitors and tourists is currently distributed to hotels, wineries, venues and other tourist attractions. It is one of the main marketing pieces for Visit Lodi! and is mailed upon request and is distributed at travel trade and sales shows. Consumers will be able to access the guide on-line and advertisers in the guide will have the ability to change their on-line ads 4 times throughout the year giving them flexibility in their advertising campaigns.
- **Festival & Events Calendar:** Visit Lodi! will produce an in-house designed/printed Festival & Events Calendar. The Calendar, produced quarterly, is a quick reference to events in the Lodi area and is distributed at the hotels, wineries, attractions, tradeshow, and included in visitor information packets.
- **Visitor Attraction Map & Guide:** The Visitor Attraction Map & Guide is distributed to hotels, wineries and attractions for their use and will be sent out to visitors upon request as well as utilized as give-a-ways at tradeshow. The map is designed to fold into a brochure so that it can be used in a card rack or as a self-mailer.
- **Meeting Facilities Brochure:** The Meeting Facilities Brochure is designed to provide information to potential consumers on event facilities and will be utilized heavily by Sales staff when promoting local venues to the group market.

Hotel Brochure Distribution: Visit Lodi! staff will provide a monthly brochure distribution service to all Lodi hotels, wineries and attractions. The goal is to ensure that visitor information is widely available and easily accessible to guests.

Events

Tourism Luncheon: May 2013, Visit Lodi! will host the 7th Annual Tourism Luncheon. The Luncheon is designed to give Visit Lodi! the opportunity to promote their programs and services to the greater Lodi community.

Communications

Newsletter: Visit Lodi!'s digital newsletter Tourism-at-a-Glance will feature new business openings, events and other items of interest to those vested in the tourism industry as well as information on programs and services offered by the Visit Lodi! Conference & Visitors Bureau. The newsletter will be distributed to local business leaders and elected officials.

Committees

Hotel Council: The Visit Lodi! Hotel Council meets quarterly to exchange information about Lodi events, promotions, and programs and services.

Destination Lodi: The Destination Lodi Committee which was started in 2011 is designed to bring together diverse industries vested in the Lodi tourism movement to enhance cooperation between industries as well as to increase cross-marketing opportunities.

RESOLUTION NO. 2012-177

A RESOLUTION OF INTENTION OF THE LODI CITY
COUNCIL TO LEVY ANNUAL ASSESSMENT FOR LODI
TOURISM BUSINESS IMPROVEMENT DISTRICT,
ESTABLISHING PUBLIC HEARING DATE, AND
APPROVING ANNUAL REPORT

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WHEREAS, the Lodi Tourism Business Improvement District was established December 20, 2004, by City Council Ordinance 1753, and as amended by Ordinances 1756 and 1818; and

WHEREAS, the Annual Report, as required by Streets and Highways Code Section 36533, has been submitted to the Board of Directors of said improvement district.

NOW, THEREFORE, BE IT RESOLVED by the Lodi City Council that it does hereby resolve, determine, and finds as follows:

1. Approves the Annual Report as submitted, said report being on file with the City Clerk.
2. Establishes November 21, 2012, in the City Council Chambers, Carnegie Forum, 305 West Pine Street, Lodi, California, at 7:00 p.m., or as soon thereafter as possible, as the date, place, and time to hold the public hearing.
3. It is the intention of the City Council to levy and collect assessments within the Lodi Tourism Business Improvement District for the calendar year 2013 (the District's fiscal year).
4. The proceeds from the Lodi Tourism Business Improvement District assessment shall be used to administer marketing programs to promote the City of Lodi as a tourism destination and to fund projects, programs, and activities that benefit hotels within the City of Lodi. The boundaries of the Lodi Tourism Business Improvement District shall be the boundaries of the City of Lodi and County Service Area #31 (Flag City). Refer to the report on file with the Lodi City Clerk's office for a full and detailed description of the improvements and activities, boundaries, and proposed assessments for the 2013 fiscal year.
5. At the time of the public hearing, written and oral protests may be made. The form and manner of protests shall comply with Streets and Highways Code Sections 36524 and 36525.

Dated: November 7, 2012

=====

I hereby certify that Resolution No. 2012-177 was passed and adopted **by** the City Council of the City of Lodi in a regular meeting held November 7, 2012, by the following votes:

AYES: COUNCIL MEMBERS – Hansen, Johnson, Katzakian, and
Mayor Mounce

NOES: COUNCIL MEMBERS – None

ABSENT: COUNCIL MEMBERS – Nakanishi

ABSTAIN: COUNCIL MEMBERS – None

A handwritten signature in black ink, appearing to read 'R. JOHL', with a stylized flourish extending to the right.

RANDI JOHL
City Clerk

Visit Lodi!

Annual Report



Visit Lodi!

CONFERENCE AND VISITORS BUREAU

Lodi City Council
November 7, 2012



2012 – Year in Review



Year in Review

- ∞ **Economy is improving**
- ∞ **TOT Tax up 13% over 2011**
- ∞ **Wineries reporting increase in number of people to tasting rooms**
- ∞ **3-5 New winery tasting rooms**



Advertising

∞ **20+ Print and Online Publications**

- ∞ **VIA, Sunset, SF Gate, CA Visitor Guide, Reach Local**
- ∞ **Real Weddings, AllAboutBirds.com, SF Chronicle Lodi Insert**

Tradeshows and Visitor Info

- ∞ **Bay Area Travel Show**
- ∞ **L.A. Times Travel Show**
- ∞ **Zinfest**
- ∞ **Sandhill Crane Festival**



Direct to Consumer Promotions

∞ **Quarterly e-Flyers**

∞ **LodiView**

*Happy ever after begins in
Lodi Wine Country*

Bride *Groom*

 Visit Lodi!
CONFERENCE AND VISITORS BUREAU

 
visitlodi.com

Call today to begin planning
your special day. (209) 365.1195

This e-flyer features a close-up of a bride's bouquet of white and pink roses. In the foreground, two white cards are visible, one labeled 'Bride' and one labeled 'Groom'. The background is softly blurred, showing what appears to be a wedding reception with glasses and lights. The Visit Lodi! logo is in the top right, and contact information is at the bottom.

*Bring your holiday party
to Lodi Wine Country*

 Visit Lodi!
CONFERENCE AND VISITORS BUREAU

visitlodi.com
  YouTube

Contact Visit Lodi! Today
800) 798-1810 or info@visitlodi.com

This e-flyer shows a group of five young adults (three women and two men) smiling and holding wine glasses, suggesting a festive holiday party. The background is dark with some colorful lights. The Visit Lodi! logo is in the bottom left, and contact information is in the bottom right.



Social Media

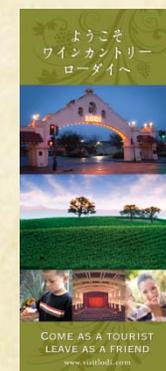
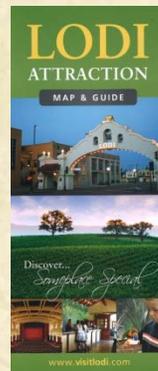
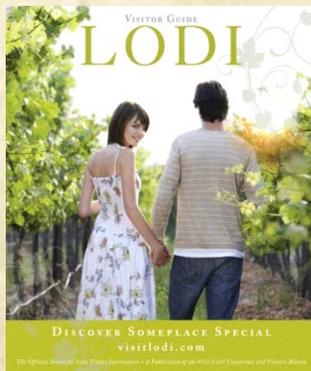
❧ **Facebook, Twitter, YouTube**





Marketing Pieces

- Visitor Guide
- Attraction Map & Guide
- Meeting Facilities Flyer
- Quarterly Event Calendar
- Chinese/Japanese Brochure





GROUP SALES



Who We Market To:

- ❧ **Meeting Professionals**
- ❧ **Association Executives**
- ❧ **Social/Fraternal Organizations**
- ❧ **Religious Organizations**
- ❧ **Wedding Parties**



How We Market:

- ❧ **Memberships in Meeting Professional Organizations**
- ❧ **Trade Shows**
- ❧ **Email Blasts & Direct Mail**
- ❧ **FAM Tours**
- ❧ **Wine & Dine Events**
- ❧ **Host at Home**
- ❧ **Advertisements/Sponsorships**



What it gets Lodi in Return:

- **Strengthens our local economy**

Through November 2012:

- **37 groups to Lodi**
- **Over \$675,000 of estimated economic impact**



Brand Campaign

- ∞ **North Star Destinations**
- ∞ **Extensive Research Process**
- ∞ **Projected Launch Date: May 2013**

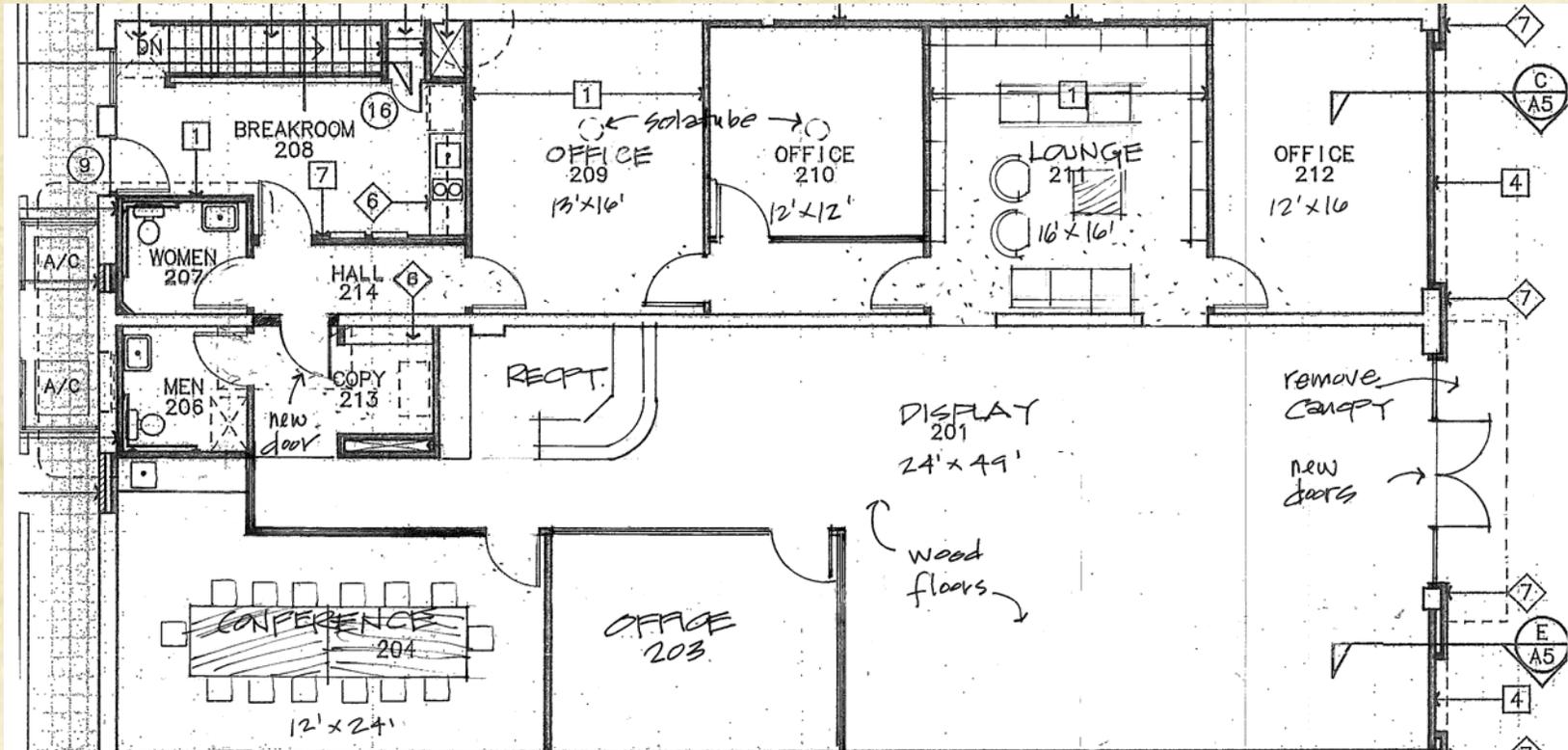
NORTH  **STAR**



Relocation

- **Moved to 25 N School Street**
- **3,000 sq. ft.**
- **Visitor Center**
- **2 phase move-in process**
- **Sub-lease opportunity**







2013 – Looking Ahead



2013:

∞ Continue Core Marketing Programs

∞ Collaborative Opportunities

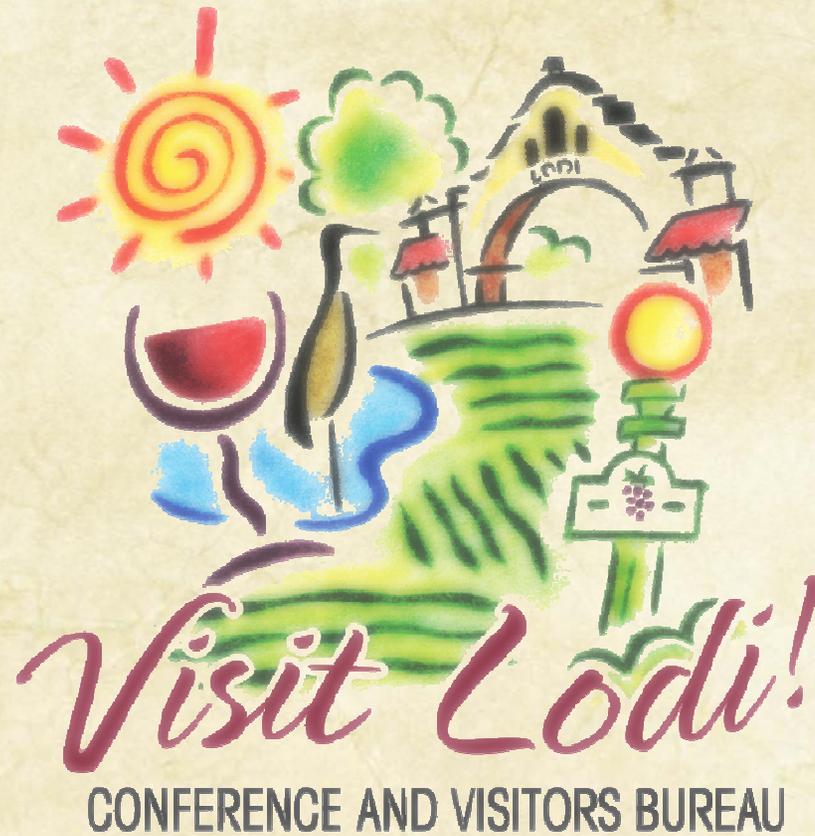
∞ Implement Our Brand

∞ New Ads

∞ Redesigned Website including mobile site

∞ New Banners

**∞ Complete Downtown Visitor
Center**



Thank You!



Please immediately confirm receipt of this fax by calling 333-6702

CITY OF LODI
P. O. BOX 3006
LODI, CALIFORNIA 95241-1910

ADVERTISING INSTRUCTIONS

SUBJECT: RESOLUTION AND PUBLIC HEARING REGARDING LODI TOURISM BUSINESS IMPROVEMENT DISTRICT 2013 ANNUAL REPORT AND CONSIDERATION OF PROPOSED ASSESSMENT

PUBLISH DATE: SATURDAY, NOVEMBER 10, 2012

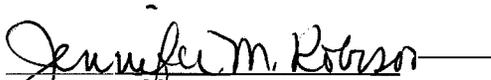
LEGAL AD

TEAR SHEETS WANTED: Three (3) please

SEND AFFIDAVIT AND BILL TO: RANDI JOHL, CITY CLERK
LNS ACCT. #0510052 City of Lodi
P.O. Box 3006
Lodi, CA 95241-1910

DATED: THURSDAY, NOVEMBER 8, 2012

ORDERED BY: RANDI JOHL
CITY CLERK


JENNIFER M. ROBISON, CMC
ASSISTANT CITY CLERK

MARIA BECERRA
ADMINISTRATIVE CLERK

Verify Appearance of this Legal in the Newspaper – Copy to File

Faxed to the Sentinel at 369-1084 at _____ (time) on _____ (date) _____ (pages)
LNS _____ Phoned to confirm receipt of all pages at _____ (time) _____ JMP _____ MB _____ (initials)



DECLARATION OF POSTING

RESOLUTION AND PUBLIC HEARING REGARDING LODI TOURISM BUSINESS IMPROVEMENT DISTRICT 2013 ANNUAL REPORT AND CONSIDERATION OF PROPOSED ASSESSMENT

On Thursday, November 8, 2012, in the City of Lodi, San Joaquin County, California, a resolution and Public Hearing Notice regarding Lodi Tourism Business Improvement District 2013 Annual Report and consideration of proposed assessment (attached and marked as Exhibit A) was posted at the following locations:

Lodi Public Library
Lodi City Clerk's Office
Lodi City Hall Lobby
Lodi Carnegie Forum

I declare under penalty of perjury that the foregoing is true and correct.

Executed on November 8, 2012, at Lodi, California.

ORDERED BY:

**RANDI JOHL
CITY CLERK**


JENNIFER M. ROBISON, CMC
ASSISTANT CITY CLERK

MARIA BECERRA
ADMINISTRATIVE CLERK

NOTICE OF PUBLIC HEARING

RESOLUTION NO. 2012-177

A RESOLUTION OF INTENTION OF THE LODI CITY
COUNCIL TO LEVY ANNUAL ASSESSMENT FOR LODI
TOURISM BUSINESS IMPROVEMENT DISTRICT,
ESTABLISHING PUBLIC HEARING DATE, AND
APPROVING ANNUAL REPORT

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5. At the time of the public hearing, written and oral protests may be made. The form and manner of protests shall comply with Streets and Highways Code Sections 36524 and 36525.

Dated: November 7, 2012

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I hereby certify that Resolution No. 2012-177 was passed and adopted by the City Council of the City of Lodi in a regular meeting held November 7, 2012, by the following votes:

AYES: COUNCIL MEMBERS - Hansen, Johnson, Katzakian, and Mayor Mounce

NOES: COUNCIL MEMBERS - None

ABSENT: COUNCIL MEMBERS - Nakanishi

ABSTAIN: COUNCIL MEMBERS - None

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RANDI JOHL
City Clerk

CITY COUNCIL

JOANNE MOUNCE, Mayor
ALAN NAKANISHI,
Mayor Pro Tempore
LARRY D. HANSEN
BOB JOHNSON
PHIL KATZAKIAN

CITY OF LODI

CITY HALL, 221 WEST PINE STREET
P.O. BOX 3006
LODI, CALIFORNIA 95241-1910
(209) 333-6702 / FAX (209) 333-6807
www.lodi.gov cityclerk@lodi.gov

KONRADT BARTLAM
City Manager
RANDI JOHL, City Clerk
D. STEPHEN SCHWABAUER
City Attorney

November 8, 2012

Nancy Beckman
President and CEO
Visit Lodi! Conference & Visitors Bureau
25 N. School Street
Lodi, CA 95240

**RE: RESOLUTION TO LEVY ANNUAL ASSESSMENT FOR LODI TOURISM
BUSINESS IMPROVEMENT DISTRICT, ESTABLISH PUBLIC HEARING
DATE, AND APPROVE ANNUAL REPORT**

The Lodi City Council, at its meeting of November 7, 2012, adopted the enclosed resolution to levy annual assessment for Lodi Tourism Business Improvement District, establish the public hearing date of November 21, 2012, and approve the Annual Report.

Should you have any questions, please feel free to contact the City Clerk's Office.

Sincerely,


Jennifer M. Robison
Assistant City Clerk

JMR

Enclosure